



onlinekhatta@gmail.com www.onlinekhatta.com





Project Details

Project Identifier



Quotation Reference No.

IBS/QUO/CRM/2K15-1211

Project Name

Online CRM System



Introduction

This proposal is just a “proposal.” Nothing is final or binding until it is signed. Everything contained herein is open to negotiation. Pricing matters shall be discussed once the required functions are finalized

We encourage the discussions on this proposal. We will be more than happy to address to your questions, comments or concerns over the proposal.

Thank you in advance for taking the time to review our proposal. We truly appreciate the opportunity to earn your business and are prepared to do whatever it takes to do so!

Overview

The primary objective is to develop and build a Online CRM Website System for advocates and law companies. This is not 100% customized solution rather its a Turnkey solution with predefined standard functions.

What is Included (“Scope of work”)

A complete, fully tested, optimized and web based Multi User Online CRM Website System.

Said Proposal is for Online CRM Website System which basic purpose is to keep it best possible level simplified so that at user level no specific IT expertise needed to operate it making it easy to operate and cost effective being in operation.

Features

QUOTE TO INVOICE LIFECYCLE

Send a quote. Get approval. Convert to invoice. One click. Seriously, that’s it.

PROVIDERS AND ORDERS

Purchase Orders, Receptions, Supplier Invoices.

GET PAID

A simple link sent to your client allows them to view and pay their invoice online.

EFFICIENT FILTERING

Quickly and immediately filter through pages and pages of data by using the filter box at the top of each page.

IMPORT DATA

Data can be imported from any other system. Don't bother re-entering all of your data – import it!

MANAGE YOUR CLIENTS

Manage your client details and keep track of who owes you what – and access the information from anywhere.

RECURRING INVOICES

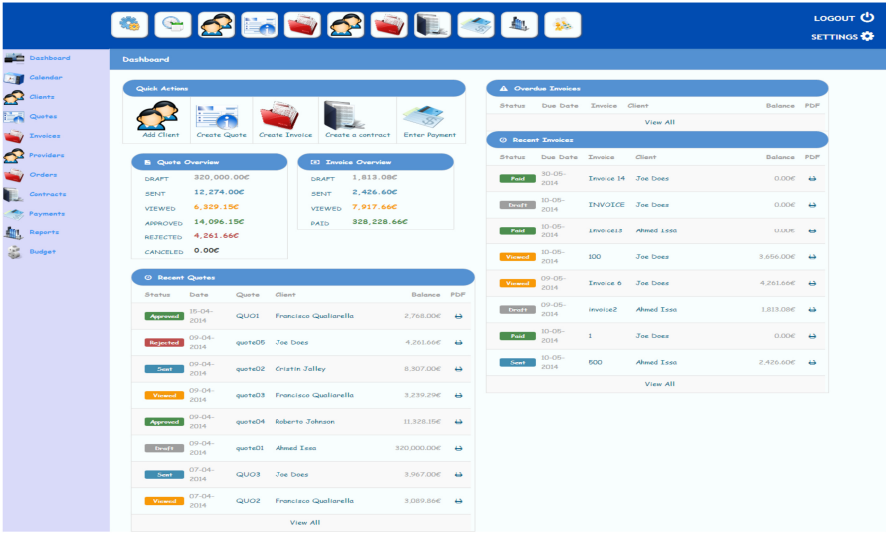
Don't create the same invoice for a client over and over again. Create it once, set it to recur, and relax.

CRM

Boost sales productivity, improve win rates, grow revenue.

DASHBOARD AND REPORTS

Everything important at a glance allows you to stay on top of your time and your clients without any effort.



Dashboard

Calendar

Clients

Quotes

Invoices

Providers

Orders

Contracts

Payments

Reports

Budget

Quote #QUO1

Francisco Qualiarella

Napoli 15 street
15 street
Napoli Napoli 55555
Italia

Phone: +3345454545
Email: qualiarella@hotmail.fr

Copy Quote

Client: Francisco Qualiarella

Quote Date: 15-04-2014

Invoice Group: Quote Default

Cancel Submit

Add Item

Add Item From Lookup

Save

Quote # QUO1

Date 15-04-2014

Expires 30-04-2014

Status Approved

Item	Description	Quantity	Price	Tax Rate	SubTotal	Tax	Total	
LDLC BG-500 Quality Sel	LDLC BG-500 Quality Select 80PLUS Bronze	1.00	274.00	None	274.00€	0.00€	274.00€	x
Lenovo Essential B590 (A	Lenovo Essential B590 (MBT3FFR)	1.00	369.00	None	369.00€	0.00€	369.00€	x
Alcatel OT-995 Ultra Noir	Alcatel OT-995 Ultra Noir	1.00	210.00	None	210.00€	0.00€	210.00€	x
HTC	htc mobile	1.00	280.00	None	280.00€	0.00€	280.00€	x
iPod Nano	iPod Nano	1.00	875.00	None	875.00€	0.00€	875.00€	x
Samsung Galaxy S3 mini	Samsung Galaxy S3 mini	1.00	400.00	None	400.00€	0.00€	400.00€	x
				None				

☐ Save item as lookup

SubTotal2,408.00€

Item Tax0.00€

Quote Tax

RemoveTPS 5.00%: 120.40€

RemoveTVA 9.95%: 239.60€

Total2,768.00€

Dashboard

Calendar

Clients

Quotes

Invoices

Providers

Orders

Contracts

Payments

Reports

Budget

Quote #QUO1

OptionsAdd ItemAdd Item From LookupSave

Add Quote Tax

Download PDF

Send Email

Quote to Invoice

Copy Quote

Delete

Quote #QUO1

Date15-04-2014

Expires30-04-2014

StatusApproved

Francisco Qualiarella

Napoli 15 street
15 street
Napoli Napoli 55555
Italia

Phone: +334545454545
Email: qualiarella@hotmail.fr

Item	Description	Quantity	Price	Tax Rate	SubTotal	Tax	Total	
LDLC BG-500 Quality Sel	LDLC BG-500 Quality Select 80PLUS Bronze	1.00	274.00	None	274.00€	0.00€	274.00€	✕
Lenovo Essential B590 (L	Lenovo Essential B590 (MBT3FFR)	1.00	369.00	None	369.00€	0.00€	369.00€	✕
Alcatel OT-995 Ultra Noir	Alcatel OT-995 Ultra Noir	1.00	210.00	None	210.00€	0.00€	210.00€	✕
HTC	htc mobile	1.00	280.00	None	280.00€	0.00€	280.00€	✕
iPod Nano	iPod Nano	1.00	875.00	None	875.00€	0.00€	875.00€	✕
Samsung Galaxy S3 mini	Samsung Galaxy S3 mini	1.00	400.00	None	400.00€	0.00€	400.00€	✕
				None				

☐ Save item as lookup

SubTotal	2,408.00€
Item Tax	0.00€
Quote Tax	Remove TPS 5.00%: 120.40€ Remove TVA 9.95%: 239.60€
Total	2,768.00€

Dashboard

Calendar

Clients

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Budget

Create Invoice

OptionsAdd ItemAdd Item From LookupSave

Client

Ahmed Issa

Invoice #

Date11-04-2014

Due Date

StatusDraft

Item	Description	Quantity	Price	Tax Rate	SubTotal	Tax	Total
Save item as lookup				None			

Invoice Terms

SubTotal

Item Tax

Invoice Tax

Total

Dashboard

Calendar

Clients

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Payments

Reports

Budget

Invoices

ALLDRAFTSENTVIEWEDPAIDOVERDUE

Filter Invoices

Status	Invoice	Created	Due Date	Client Name	Amount	Balance	Options
Paid	Invoice 14	30-04-2014	30-05-2014	Joe Does	4,261.66€	0.00€	Options
Draft		10-04-2014	10-05-2014	Joe Does	0.00€	0.00€	Options
Paid	Invoice13	10-04-2014	10-05-2014	Ahmed Issa	320,000.00€	0.00€	Options
Viewed	100	01-04-2014	10-05-2014	Joe Does	3,656.00€	3,656.00€	Options
Viewed	Invoice 6	09-03-2014	09-05-2014	Joe Does	4,261.66€	4,261.66€	Options
Draft	invoice2	09-02-2014	09-05-2014	Ahmed Issa	1,813.08€	1,813.08€	Options
Paid	1	01-02-2014	10-05-2014	Joe Does	3,967.00€	0.00€	Options
Sent	500	10-01-2014	10-05-2014	Ahmed Issa	2,426.60€	2,426.60€	Options

GUEST ACCOUNTS

Restricted guest accounts allow clients, accountants, or anybody else you want to have access to view their information without messing with anything else.

Methodology

Throughout Design, Develop and Implementation Process core Conceptual concept will remain in mind to keep operational system simplified upto maximum possible level so that operating said does not require any technical knowledge.

All Complexities of operational and conceptual procedures will be delt by the software internal algorithm. Keeping it simple for operator. For its operation any body who can play with computer can operate the Software.

Technology and Compatibility

Note: if all the jargon below is Greek to you, just know that it basically means that we will develop the Software to conform with all of today's technology standards.

Development Media : PHP,XML,
Database : mySQL

Timelines and Milestones

Our *tentative* production schedule proposed is as follows. However, please realize that these are NOT deadlines. If you require a specific launch date or other sorts of deadlines, we are happy to oblige given enough advance notice. Otherwise, we prefer to estimate the timeframes but ultimately take the amount of time that is needed for the best results. While we don't bill you by the hour, our costs are based on the amount of time we invest into each project. So rest assured that we have a very vested interest in moving quickly.

(Note that the days are measured in business days, starting from the day the project begin by receiving down payment and initial data required to take start.)

Basic Core development	2 Weeks
First Implantation and Testing at Client Site	1 Weeks
Fine tuned Final Version Handover	1 Weeks

Fees & Payment

Please go through details covered in this proposal. It would be easy for us to settle down the cost of the project when requirements are completely discussed by both parties.

Important Notes/Points:

- Simply providing of Binaries. Source code will remain the property of the Intelligent Business Solution and will never be handed over what so ever the case may be.
- This proposal is designed keeping in mind that this site would be support site not the shop main site. If you want to have it shop Company main site we can send u revised reworked proposed model.
- As we can not share source code so hosting will be remain under our charge and we shall provide. What sort of hosting account needed depend upon
 - 1 Number of total Users
 - 2 Number of user using site at same time
 - 3 nature and volume of data
 - 4 Backend webapplication required initial dedicated RAM
- Cost Structure
In order to give you idea of web application cost structure it would have following components
 - initial Setup Fee
 - Monthly charges
 - Training Charges

We really appreciate for your time and energies you have spend for going through this comprehensive proposal. If you need any further information, details it would be our pleasure to provide you the same.

Hoping to hear from you soon and a proper detailed meeting time so that we can discuss your needs and can show how this application can full fill your needs.

Assuring you best of our services and looking forward to have good future business relationships.

Regards.

**** NOTHING FOLLOWS****